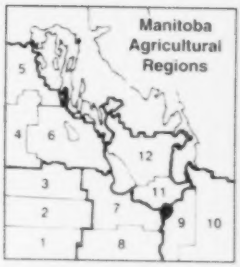
Manitoba
Agriculture
and Food

PROGRAM & POLICY ANALYSIS

Agriculture Statistics



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SUBJECT: MANITOBA AGRI-FOOD EXPORTS, 1994 - 2003

- Preliminary trade data for 2003 show a total value of major Manitoba agri-food exports to all destinations of $2.748 billion, 3.8% less than 2002, and 8.3% less than the record level of 2001, with much of the decline due to trade restrictions.
- Live ruminant exports were halted following the confirmation of bovine spongiform encephalopathy (BSE) in a cow in Alberta on May 20, 2003. In September, 2003, a number of countries including the US and Mexico allowed a resumption of imports of specified Canadian boneless beef products.
- US import tariffs were imposed on Canadian wheat during 2003, beginning March 4 at 3.94%, and increasing by August 29 to 14.15% on Spring wheat and to 13.55% on Durum wheat. The Durum tariffs were removed on October 4, while the Spring wheat tariffs were maintained.

Unprocessed/Bulk:

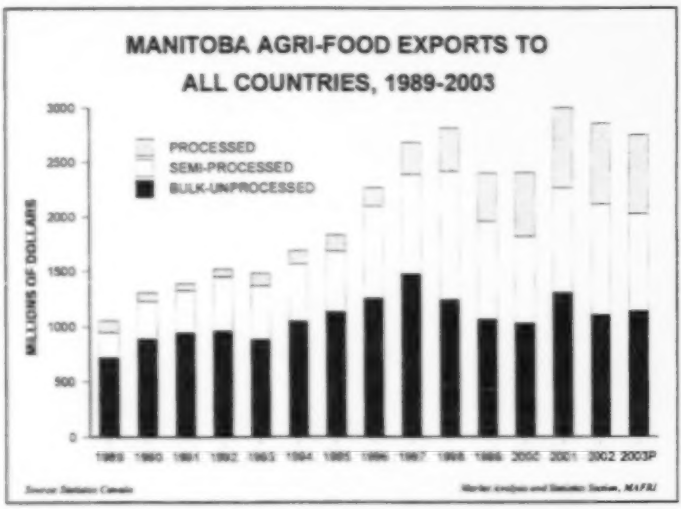
- Unprocessed or bulk exports accounted for 41.6% of the 2003 total. Bulk exports were primarily field crops, and were valued at $1.144 billion, 1.02% more than in 2002, but 23% below 1997.
- Wheat exports alone declined 12.2% in 2003, with both quantity and value lower than in 2002.
- An increased volume allowed the total bulk canola export value to recover to $280 million, similar to the 2001 level, and well above the recent low of $200.3 million in 2002.
- The total export values of oats, sunseed and forageseed exports were also higher in 2003 than in 2002, while the export values of barley, flax, mustard, and canaryseed were lower.

Semi-Processed/Intermediate:

- Exports in semi-processed or intermediate form accounted for 32.1% of the total, and were primarily products from livestock, from oilseed and oat crushing, and pulse crops. Exports totaled $883.0 million in 2003, 12.6% below 2002, but more than 70% above 1994.
- The value of Manitoba cattle exports dropped to a recent low of $106.7 million in 2003, less than 40% of the 2002 level of $273.2 million.
- The value of Manitoba hog exports continued to increase in 2003, rising to $276.4 million, 12.4% more than in 2002.

Processed/Consumer:

- Exports in processed form accounted for 26.3% of the total, and were primarily meat and potato products and honey. Processed exports totaled $722.1 million in 2003, 2.2% below 2002. Since 1994, processed exports have increased approximately 6-fold.
- Manitoba's processed pork exports totaled $438.9 million in 2003, a 5.2% drop from 2002. Processed beef exports totaled only $2.8 million
- Increased global vegetable oil values helped increase the value of Manitoba's canola oil exports to $171.2 million, up 27.1% from 2002, but still well below the $488.3 million of 1998.
- Exports of frozen potato products increased to $205.8 million in 2003, 27.9% more than in 2003, and well above the $2.7 million of 1994.



DATA SOURCE: Statistics Canada, Agriculture & Agri-Food Canada.

Market Analysis & Statistics Section; PH: (204) 945-4017/3503
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MAJOR MANITOBA AGRI-FOOD EXPORTS, 1994 – 2003

COMMODITY	1994	1995	1996	1997	1998	1999[R]	2000[R]	2001[R]	2002[R]	2003[P]
	- millions of dollars -									
UNPROCESSED/BULK:										
Durum Wheat	20.8	43.9	24.4	34.2	33.8	32.3	10.0	16.5	48.1	41.2
Other Wheat	509.4	466.4	645.0	740.8	422.3	426.6	501.0	673.9	534.5	470.5
Barley	44.8	36.7	64.5	73.7	33.4	27.1	24.1	57.7	14.2	12.5
Oats	34.2	45.7	79.0	107.1	64.1	66.0	87.5	92.6	86.4	89.0
Canola	275.6	325.5	238.3	278.2	454.7	345.9	254.2	281.7	200.3	280.0
Flaxseed	86.9	113.7	106.5	143.1	123.9	73.2	48.7	66.4	83.1	79.5
Mustard Seed	23.5	16.0	26.4	17.8	13.5	14.2	12.0	17.1	14.5	14.3
Canary Seed	16.4	19.0	18.4	16.9	12.6	14.8	14.4	19.3	26.0	21.6
Sunflower Seed	14.7	24.6	15.5	15.5	23.8	20.7	23.6	32.1	44.5	45.8
Forage Seeds	21.9	26.7	27.7	36.0	40.7	38.8	41.1	36.1	31.1	37.2
Other Bulk	9.7	16.8	16.0	21.1	23.1	10.9	15.0	13.7	25.5	52.9
TOTAL BULK	**1,057.9**	**1,135.0**	**1,261.8**	**1,484.5**	**1,245.8**	**1,070.6**	**1,031.4**	**1,307.2**	**1,108.4**	**1,143.7**
SEMI-PROCESSED/INTERMEDIATE:										
Wheat Flour	13.2	10.5	0.0	0.1	0.8	1.9	1.9	4.1	4.5	4.0
Oat Groats, Meal & Flakes	10.8	13.5	22.2	26.5	29.4	35.8	27.9	39.9	31.8	31.9
Lentils	29.7	30.4	31.9	21.6	20.6	25.0	24.4	18.0	17.6	13.2
Dry Peas	74.3	39.9	37.3	75.7	47.3	36.7	44.4	68.2	38.3	52.2
Dry Beans	10.3	14.1	18.8	14.8	25.7	54.4	48.9	68.8	82.2	76.3
Refined Sugar	29.2	12.7	5.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0
Canola Oil	57.9	92.5	207.7	192.7	488.3	239.1	111.5	109.6	139.3	171.2
Canola Meal/Cake	35.8	42.6	55.0	60.7	54.2	40.3	27.2	25.3	30.2	30.2
Linseed Oil	0.3	4.5	3.4	4.9	4.5	4.3	3.8	2.6	4.6	4.0
Linseed Meal/Cake	0.4	0.7	0.5	6.0	0.9	1.4	1.3	1.0	1.5	2.5
Flax Fibre/Tow/Waste	12.9	18.6	27.4	26.2	30.7	27.3	23.3	21.1	11.1	13.0
Malt	13.7	12.8	20.5	17.5	14.7	16.6	23.4	28.1	21.1	11.6
Other Vegetable Oils	5.8	11.9	15.5	11.4	2.0	0.5	1.2	0.1	0.3	1.0
Egg Albumin	2.5	4.3	6.4	6.9	8.8	11.1	9.3	9.8	7.8	15.4
Cattle/Bison	138.0	145.1	186.5	222.0	238.4	176.8	188.3	257.7	273.2	106.7
Hogs	40.6	67.6	154.8	184.0	155.8	165.3	207.6	247.5	246.0	276.4
Sheep	1.8	3.5	4.6	6.5	6.3	5.6	4.3	4.6	5.5	2.6
Cattle Hides	2.0	0.8	0.4	0.4	0.5	0.5	0.6	0.3	0.3	0.3
Other Animal Feeds	19.6	17.9	27.1	29.6	21.9	17.0	16.0	22.9	40.2	24.2
Other Intermediate	12.4	13.0	16.5	22.5	21.3	26.9	26.5	33.2	55.6	47.0
TOTAL INTERMEDIATE	**511.2**	**556.9**	**842.0**	**910.5**	**1,172.1**	**886.6**	**791.8**	**962.8**	**1,010.8**	**883.0**
PROCESSED/CONSUMER:										
Beef	5.3	2.8	3.4	4.3	5.2	6.5	6.9	5.3	4.4	2.8
Pork	79.0	81.6	77.9	154.4	197.3	240.0	398.9	518.6	491.4	438.9
Skim Milk Powder	3.3	5.7	2.6	2.9	1.7	1.6	0.0	0.6	3.4	1.1
Eggs, Yolks/Dried	2.2	1.9	1.6	3.2	3.3	3.8	3.9	7.1	10.2	10.2
Potatoes, Fresh	2.2	4.6	5.4	1.9	3.7	4.1	3.4	6.1	8.2	6.9
Potatoes, Frozen	2.7	10.7	35.8	87.5	140.5	143.5	127.7	141.8	160.9	205.8
Honey	6.1	12.5	8.7	8.9	13.7	16.5	18.5	17.7	33.0	24.6
Beverages	3.1	3.0	1.1	0.1	2.1	4.3	4.6	4.0	1.4	2.1
Other Consumer[1]	15.6	21.3	25.1	22.2	25.8	25.7	20.5	27.3	25.9	29.5
TOTAL CONSUMER	**119.5**	**144.1**	**161.6**	**285.3**	**393.3**	**446.1**	**584.4**	**728.6**	**738.7**	**722.1**
TOTAL EXPORTS	**1,688.6**	**1,836.0**	**2,265.4**	**2,680.3**	**2,811.2**	**2,403.2**	**2,407.6**	**2,998.6**	**2,858.0**	**2,748.8**

[1] Includes re-exports of tobacco and coffee. [R] Revised. [P] Preliminary.